Internal Sales and Marketing - LCA

This role is responsible for general marketing as well as Key Account coverage, with sales integrated into the position. The main responsibility is to assist the VP of Sales and Marketing with Broker Dealer and other Strategic Relationships, with the goal to maintain a competitive edge and increase our visibility.

The Internal sales and marketing representative will also manage the third-party tools offered to LCA advisors. This includes the set up for each user as well as coordinating training.

In addition, this role will assist in general sales and marketing, including marketing pieces, webinar invitations, newsletters, email blast and conference promotion and sales follow up. This includes sales calls to targeted areas and specific campaigns. The primary objective with marketing is to produce and maintain intelligent and interesting marketing pieces that will attract attention to our firm. This will include social media marketing.

Minimum Requirements:

- Bachelor's Degree in Marketing, Business Administration or related field.
- Three (3) years of sales experience within the financial services industry. Prior experience in the independent, Insurance Broker Dealer and RIA channels a plus.
- Knowledge of investment services products, services, and operations. TAMP experience a plus.
- Proven marketing skills and the ability to positively promote products and services to would be clients.
- Excellent communication, written and verbal skills
- Strong proficiency using Microsoft Word, Excel, and PowerPoint, Publisher. Sales Force a plus.
- Experience selling into independent BD’s, CPA’s as well as RIA’s.
- Ability to work independently
- Ability to travel 20% of the time
- Series 65 and 63 registrations expected within 12 months

Primary Responsibilities:

Key Account Assistant – assist manager with all BD, RIA, Platform and Strategic relationships (contacts, marketing/newsletter ideas, sales, admin, operations, compliance/due diligence requests, strategic, etc.).

Manage webinar series

- Manage presentations, schedule, blasts, compliance approval
- Follow up and track attendees in SF

Technology for Advisors: assist VP of Sales to manage the day to day duties

- Riskalyze – maintain the user list, keep in contact with Riskalyze rep, train new users on system and handle day to day inquiries
- Infinata – maintain user list, training and coordination
- Sales Force – manage database to define and track metrics as well as leads. Coordinate with SF admin to make changes, updates and strategic fields.
- Advisor Lab – maintain the user list and coordinate training

General Marketing and Sales:

- Keep all materials fresh and consistent.
- Sales calls to targeted areas and follow up to sales campaigns
- Assist VP of Sales with Key Account coverage – sales and marketing ideas
- Manage DFA Conference schedule – invitations, coordination with DFA, scheduling, etc.
- Assist in BD conferences – pre/post blast, materials and speaker coordination
- Work with VP of Sales to create monthly sales ideas
- Oversee the process of keeping presentations current and updated
- Review and keep client kits fresh and current
- QTRL Newsletter/EDGE – gather and suggest ideas.
- Identify DFA or other articles/materials to add to LCA website.
- Oversee the marketing content on website (updates, ideas)

Compensation:

- Compensation is paid by a base salary, plus quarterly fee bonus.

Benefits:

- Medical, Dental and Vision coverage
- 401(k)

Please email resume and cover letter to kborchardt@lindnercapital.com